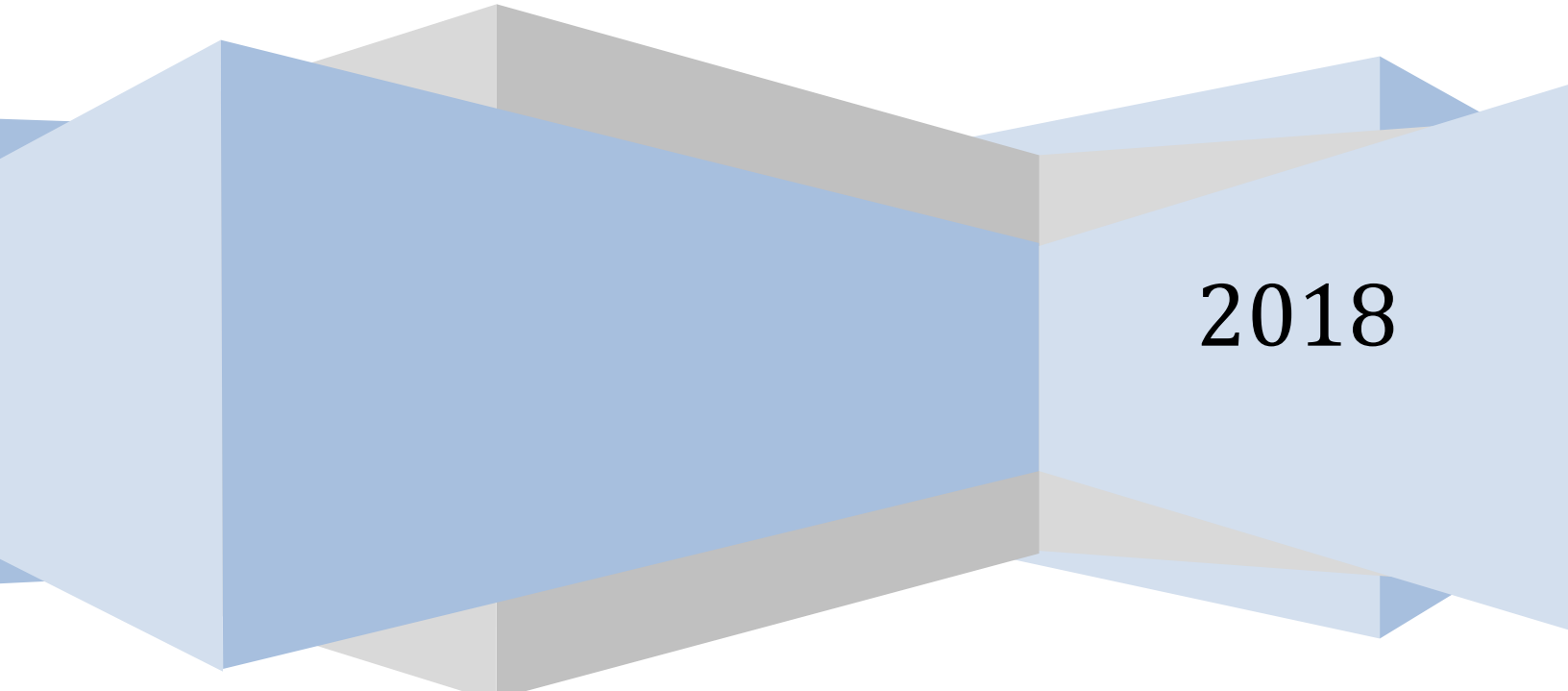# Washington Disease Reporting System
Hepatitis (B & C) Quick Start Guide

Washington State Department of Health
Office of Infectious Diseases &
Office of Communicable Disease Epidemiology

WDRS
Washington Disease Reporting System

2018

Washington State Department of
Health

This guide is non-exhaustive and only includes fields that need additional explanation. Please direct questions on topics not covered in this guide to your disease-specific point of contact.

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KEY to Symbols

Pay particular attention

Remember to save the patient record

Questions?

Contact the Washington State Department of Health Hepatitis Program
General Hepatitis C Email hepatitis@doh.wa.gov
General Hepatitis B/D Email: CommDisEpi@doh.wa.gov

Disclaimer: The examples used in this reference guide are fictitious. Any resemblance between any person or case illustrated in this reference guide and an actual person or case is purely coincidental.

For persons with disabilities, this document is available on request in other formats. To submit a request, please call 1-800-525-0127 (TDD/TTY call 711).

Getting Started

The Washington Disease Reporting System (WDRS) Hepatitis Disease Model is used to report cases of hepatitis to the Washington State Department of Health (DOH). This guide is intended to serve as a quick reference for users familiar with WDRS basics. For more detailed instructions on any content in this guide, please refer to supplementary WDRS training materials on the main WDRS page (https://www.doh.wa.gov/WDRS) or the Hepatitis WDRS page (https://www.doh.wa.gov/WDRSHepatitis).

Logging into WDRS

Once you log into WDRS through SecureAccess Washington (SAW), you will be brought to the **WDRS Home Page**. This page is customizable and will look different depending on the user's permissions and settings.

If you are unable to login to SAW, call Service Central at **360-236-4357**. It will help to have your error message ready.

You may search for a person or create a new **event** (patient record) from the **WDRS Home Page**. **Always search for an event or person before creating a new event or new person.** To search for an event or person, click the Search Event icon on the toolbar at the top of the screen.

Once you have created, or found, a patient **event** (patient record), the **Event Summary** screen will be displayed.

There are two ways to enter data for a new **event** in WDRS: use **Wizards** or use individual **Question Packages**. Both can be found at the bottom of the **Event Summary Screen**.

Question package, or tabular, entry requires you to enter data through individual question packages and choose the fields to input. **Wizards**, however, are condition-specific and take relevant questions from the different question packages to create one page for data entry. **Wizards are the recommended method for data entry**. See the Wizards section to learn more.

WDRS Toolbar
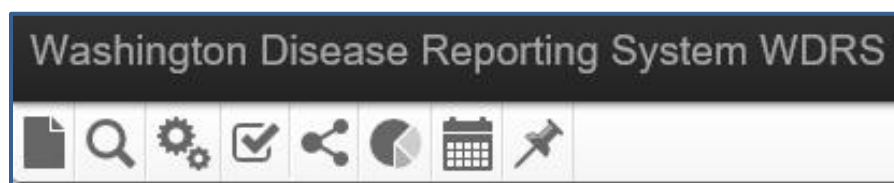
The toolbar displays icons that initiate most activities. It can be found at the top left-hand side of the **WDRS Home Screen**. **Your role will determine which icons you see.** The toolbar will change depending on your activities in WDRS. The icons listed below are the most widely-available action items in WDRS.

Create Event – used to create a new event.

Search Event / Search Case – used to search for an existing event, based on various search criteria (such as case name).

Workflow / Workflow Queue – used to view user workflow queues. Workflow queues are designed to bring attention to events that need user action. Please see the section on Workflows in this guide for additional information about Hepatitis B & C-specific workflows.

Tasks – used to assign and update statuses of specific tasks.

 Reports / Maven Reporting – used to view, print and export reports from data entered in WDRS including line list, tabular and extract reports that can be customized for local or state use.

View User Calendar – user tool for adding and viewing tasks, meetings, appointments, and more.

 Recent Events – provides easy access to the previous 20 events that have been viewed by the current user.

Tips and Tricks

- Hover over the **information icon** for more information about a question/field.

- Some questions have **additional drop down questions** that may not be visible until you select an answer for the question in view.

- Pay attention to **red text**, which may indicate concerns or incomplete sections needing your attention.

- **Please leave fields blank if the question was not asked or is not applicable**. Select "**Unknown**" only when there was an attempt to get the information and the answer is unknown.

- **Save early and often**! The WDRS system will automatically time out due to inactivity after 20 minutes, and there is no autosave function.

- Some **greyed out fields** do not allow changes to be made on the current screen. If changes to these fields are needed, make the change on the page where the information was originally entered.

  For example, if you are navigating a wizard, you cannot change 'Date of birth' or 'Sex' directly in the wizard.

	DEMOGRAPHICS
* Date of birth ℹ	01/01/1990
* Sex ℹ	Female ▾
* Ethnicity	▾

  To modify these particular fields, you need to return to the 'Edit Person' screen.

  Manage Person

  Edit Person

First Name:*	Middle Name:	Last Name:*
Daisy		Duck

  Suffix:

Birth Date:	Sex assigned at birth:	Social Security Number:
01/01/1990	Female ▾	

- Anywhere you see an **"Add New"** link, you may click on it to make additional entries for that question (called a 'repeatable'). Repeatable questions are indicated throughout this guide with a diamond symbol (♦).

- When the magnifying glass or **search icon** appears next to a field, click on the icon to search for a response from a preexisting list.

Best practice is to enter the first two or three letters of the name followed by an asterisk(*). This is called the **Wildcard Function**, which searches for terms that match the initial characters input and unknown characters following the asterisk.

For example, for a search of Providence Hospital, you could type "Pr*". This would pull up options that start with 'Pr'. For more information on this function, see the general WDRS Reference Guide.

- To **edit Person information**, such as address or vital status, navigate to the **Event Summary** screen, click on the **Persons** tab, and select 'Edit Person' (option 1). You can also click on the hyper-linked name of the person in the **Basic Information** section, and select 'Edit Person' (option 2).

Option 1.

Option 2.

- The handling of **uncertain dates** in WDRS varies by program area. For Hepatitis:
  - **If month and year are known and you can make a close estimate of the day (e.g. got sick "a week ago"), pick a day**.
  - **If the month and year are known and you cannot make a close estimate of the day (e.g. got sick "since March"), input the first of the month for that month and year**. Note: Select 'Derived' = Yes when you cannot make a close estimate of the day.
  - If the date is completely unknown, leave the field blank. This is especially important for the **Symptom onset date**.

ELR-Created Events

New events that are created as a result of an Electronic Laboratory Report (ELR) can be accessed in the workflow categories: **Lab reports for review – action required** and **Potential chronic hepatitis cases – action required**. Events in these workflows will require review to determine whether they are acute, chronic or perinatal.

Manually Entering Event Data into WDRS: Overview

1.) Search for an existing event/case or person.
   - **Always search for an existing event or person before creating a new event or new person.**
   - Please see the general WDRS Reference Guide for more information.

2.) If event/person is not found in the system, create a new event (for this case or person) and enter as much information as possible.
   - The minimum information required to create an event is first and last name for the person, as well as their reported disease condition.
   - It is important to include as much information as possible when creating an event because information entered is used to populate other fields.
   - Please see the general WDRS Reference Guide for more information.

3.) Add, edit, and review lab results under the **Lab Results** tab on the **Event Summary** page.
   - Brief overview of **required** fields to enter for manual hepatitis labs:
     - **Specimen identifier/accession number.**
     - **Specimen collection date.**
     - **WDRS test performed** (Test type).
     - **WDRS test result, coded** if you are inputting non-numeric results (i.e. genotype).
     - If a numeric result is given: enter **WDRS result, comparator** (if present*),

WDRS result, numeric only (actual numeric result), and **WDRS units of measure** (if present).

- o **WDRS result summary** (not needed for ALT or other similar liver function values).
- o **WDRS performing organization** (Test laboratory).
- o **WDRS ordering provider** (Test provider).
    - (if not available, **WDRS ordering facility** (Test facility).
- Please see the required lab tests & results section in this guide for more information.

4.) Use a wizard to enter additional data.
- Please see the wizards section of this guide or the WDRS Hepatitis Instruction Manual for more information.

5.) Navigate each question package individually as necessary in order to enter data that is not captured in the wizards.
- Refer to the WDRS Hepatitis Instruction Manual for more details on **Question Packages.**

Lab Results

Please leave fields blank if the question was not asked or is not applicable. Select "**Unknown**" only when there was an attempt to get the information and the answer is unknown.

Enter all laboratory results in the **Lab Results** tab by selecting 'Add Lab Result'. Please refer to the WDRS Lab Result Instruction Manual for specific instructions on how to enter laboratory results.

Please note: Just before go-live of WDRS on 6/25/2018, hepatitis labs received in Public Health Reporting of Electronic Data (PHRED) from 5/9/18 to 6/25/18 will be imported into WDRS by DOH.

Starting with go-live of WDRS on 6/25, DOH will perform a daily import of labs from PHRED into WDRS. This daily import will involve some standardization of lab data including test type (**WDRS test performed**) and result (**WDRS result coded** and **WDRS result summary**), as well as assigning accountable county. These daily-imported labs will create open events in WDRS that can be found and reviewed through various workflows. After 6/25, PHRED will remain operational, but labs **do not** need to be printed from PHRED and manually entered into WDRS. The daily import of PHRED labs will continue until the launch of the Disease Reporting Interoperability and Verification Engine (DRIVE) system, anticipated in December 2018.

Brief overview of required tests to enter (if available):

Hepatitis B	Hepatitis C
Alanine aminotransferase (ALT)	Alanine aminotransferase (ALT)
Hepatitis A IgM [a]	HCV RNA (qual. and quant.)
Hepatitis B core antigen IgM (anti-HBc IgM)	Hepatitis A IgM [a]
Hepatitis B e antigen (HBeAg)	Hepatitis B core antigen IgM (anti-HBc IgM)
Hepatitis B genotype	Hepatitis C antibody
Hepatitis B surface antigen (HBsAg)	Hepatitis C antibody signal-to-cut-off ratio
Hepatitis B virus DNA (qual. and quant.)	Hepatitis C antigen [b]
Hepatitis Delta (D) RNA	Hepatitis C genotype
Hepatitis Delta (D) antibody (anti-HDV)	
Hepatitis Delta (D) antigen	

[a] Result used to aid with differential diagnosis
[b] When an FDA-approved test is available

Required tests and fields for manual Hepatitis B lab entry in WDRS

Test	Alanine aminotrans-ferase (ALT)	Hepatitis A IgM	Hepatitis B core antigen IgM (anti-HBc IgM)	Hepatitis B e antigen (HBeAg)	Hepatitis B genotype	Hepatitis B surface antigen (HBsAg)	Hepatitis B virus DNA, Qualitative	Hepatitis B virus DNA, Quantitative	Hepatitis Delta (D) RNA	Hepatitis Delta (D) antibody (anti-HDV)	Hepatitis Delta (D) antigen
Specimen											
Specimen identifier/accession number	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Specimen collection date	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Test performed and result											
WDRS test performed *(Test type)*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
WDRS test result, coded *(i.e. non-numeric results like genotype)*					✓						
WDRS test result, comparator *(e.g. < symbol)*	✓, if present							✓, if present	✓, if present		
WDRS result, numeric only *(Actual numeric result)*	✓							✓	✓		
WDRS units of measure *(e.g. IU/mL)*								✓	✓		
WDRS result summary *(e.g. positive or negative)*		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
WDRS performing organization *(Test laboratory)*	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ordering provider											
WDRS ordering provider *(Test provider)*	✓, but if not available, input WDRS ordering facility										
Ordering facility											
WDRS ordering facility *(Test facility)*	Only if no ordering provider										

Test	Alanine aminotransferase (ALT)	HCV RNA (NAT) qualitative	HCV RNA (NAT) quantitative	Hepatitis A IgM	Hepatitis B core antigen IgM (anti-HBc IgM)	Hepatitis C antibody	Hepatitis C antibody signal-to-cut-off (s/co) ratio	Hepatitis C antigen (when test available)	Hepatitis C genotype
Required tests and fields for manual Hepatitis C lab entry in WDRS									
Specimen									
Specimen identifier/accession number	✓	✓	✓	✓	✓	✓	✓	✓	✓
Specimen collection date	✓	✓	✓	✓	✓	✓	✓	✓	✓
Test performed and result									
WDRS test performed *(Test type)*	✓	✓	✓	✓	✓	✓	✓	✓	✓
WDRS test result, coded *(i.e. non-numeric results like genotype)*									✓
WDRS test result, comparator *(e.g. < symbol)*	✓, if present		✓, if present				✓, if present		
WDRS result, numeric only *(Actual numeric result)*	✓		✓				✓		
WDRS units of measure *(e.g. IU/mL)*			✓						
WDRS result summary *(e.g. positive or negative)*		✓	✓	✓	✓	✓	✓	✓	✓
WDRS performing organization *(Test laboratory)*	✓	✓	✓	✓	✓	✓	✓	✓	✓
Ordering provider									
WDRS ordering provider *(Test provider)*	✓, but if not available, input WDRS ordering facility								
Ordering facility									
WDRS ordering facility *(Test facility)*	Only if no ordering provider								

Wizards

Wizards are a way to make data entry or data viewing easier. They take relevant questions from the different question packages to create one spot for data entry. **Wizards are the recommended method for data entry.** For more detailed information on Hepatitis B and C wizards, see the [WDRS Hepatitis Instruction Manual](#).

Please leave fields blank if the question was not asked or is not applicable. Select "**Unknown**" only when there was an attempt to get the information and the answer is unknown.

The following wizards are available for Hepatitis B and C cases:

Hepatitis B	Hepatitis C
• Acute Hepatitis B Wizard • Chronic Hepatitis B Surveillance Wizard • Chronic Hepatitis B Interview Wizard • Perinatal Hepatitis B Wizard	• Acute Hepatitis C Wizard • Chronic Hepatitis C Lab Surveillance Wizard • Chronic Hepatitis Wizard

Administrative

Example of **Administrative** section from the Acute Hepatitis B Wizard:

Confirm subtype
- Select 'yes' to confirm applicable subtype(s) (acute, chronic, and/or perinatal) as soon as possible. Additional question packages will become available after subtype is confirmed.
- If hepatitis D co-infected, select 'yes' to "Hepatitis D co-infected".
- **After confirming subtype: Changing the subtype in the Administrative question package, after data has been entered, will result in loss of all information entered in the wizard.**

Event Administration

Example of **Event Administration** section from an Acute Hepatitis event:

ACUTE EVENT ADMINISTRATION	
Select the reporting address to assign the county of diagnosis.	
Street address	1234 10th Ave
Street address 2	
City	Olympia
State	WA
Zip code	98501
County	Thurston County
* County of diagnosis (accountable county)	Thurston County
* LHJ notification date	04/03/2018
* Investigator	Shana Paulsen
* Investigation start date	04/05/2018
* Investigation status	In progress
LHJ investigation complete date	MM/DD/YYYY
LHJ case classification	

Address Information

- Select the address at the time of reporting in Washington State. The county of diagnosis (accountable county) will autofill based on address selected.

Choose Associated Address

Available Contact Points

Start Date	End Date	Address Type	Address	Residence Type	Address Status	Select
04/05/2018	01/01/2030	Home	1234 10th Ave Olympia, WA 98501 Thurston County	Private Residence	Verified	Select as Official Address
01/01/1900	04/05/2018	Home	WA			Select as Official Address

Close   Help

- To edit or add an address, click on the hyper-linked name of the Person in **Basic Information** under **Event Summary** and select 'Edit Person'.

- If the record was created by an Electronic Laboratory Report (ELR) submission, the address on the lab report will be copied into the person record automatically. It can then be selected using the address selection link in the wizard.
- If a residential address is not available, the address of the provider or laboratory will be used to assign a record to an accountable county.
- To enter address information for a person experiencing homelessness, select 'Other' for **Address Type**, then select 'Homeless' for **Residence Type.**

LHJ notification date
- Enter the date that the Local Health Jurisdiction (LHJ) was notified of the event.
- The **LHJ notification date** can be different than the **Report date**. For example, if King County received a Pierce County lab result dated 2/1 and sent the lab to Pierce County on 2/5, the **Report date** would be 2/1 and the **LHJ notification date** would be 2/5.

Investigator
- Use this field to record the investigator responsible for this event.
- Select the **search icon** to search for and select your WDRS username (this is the same as your SAW user ID).

Investigation start date
- The investigation start date is the date the investigator initiated action on the event.

Investigation status
- The investigation status must be marked as 'Complete,' 'Complete – not reportable to DOH,' or 'Unable to complete' to enter a **Record complete date**.

LHJ investigation complete date
- The **Investigation complete date** is entered when an LHJ has completed their active investigation. This date is different than the **Record complete date**.

LHJ record complete date
- The **Record complete date** is entered when the LHJ is ready to complete the event.
- To complete an event, you must have the following fields answered:
  - County of diagnosis (accountable county).
  - LHJ notification date.
  - Investigator.
  - Investigation start date.
  - Investigation status.
  - Disease status. The hepatitis event must have a confirmed subtype (acute, chronic, and/or perinatal). An event cannot be closed with a pending subtype.
- **Entering a date in this field will lock the event information, so all data entry must be complete before entering a Record complete date.**

Command buttons

Click the 'Save' button to save your changes and return to the **Event Summary** screen. 'Save & Stay,' 'Cancel' and 'Help' buttons are also available options.

Persons Who Have Been Reported as both Acute and Chronic Cases

In the Hepatitis model, if a person has had both acute and chronic subtype information reported for a disease (Hepatitis B or Hepatitis C), then **both types of information are entered in the same event.** The following screenshot depicts a Hepatitis C event that has both acute and chronic subtypes confirmed. **Disease Status** can be located in either the **Administrative question package** or in the **Administrative** section of **the applicable Wizard**:

When new labs indicate that a formerly acute case has become a chronic infection, the Chronic disease status should be **added** to the event record – **do not change the disease status from Acute to Chronic; doing so will result in loss of all information entered in the Acute fields.**

Within a question package, groups of fields that are associated with a particular subtype (i.e. acute, chronic or perinatal) will be indicated by a descriptive header. The following screenshots are an example of these headers in the **Administrative question package**:

Transferring and Sharing Events/Cases

Event/Case Belongs to another Jurisdiction

If a person was incorrectly reported to your jurisdiction, you can transfer events/cases by updating the reporting address. Once the **County of diagnosis (accountable county)** field is updated in the **Administrative question package** (also available in **Wizards**), the new county will now have view and edit permissions. It will also enter one of the open event workflows of the other county, so long as the **LHJ record complete date** field in the **Administrative question package** (also available in **Wizards**) is empty.

WARNING: If you did not create the event, you will lose access to the event after updating the County of diagnosis (accountable county) field to a new jurisdiction. Refer to the WDRS Quick Reference Guide for an alternative way to share events with another jurisdiction.

Event/Case Has Moved to another Jurisdiction and You Would Like the New County to Have Edit Permissions

If you receive event information (e.g. lab results) that indicates that a person's residential county has changed (but the accountable county should stay the same), you may update the event's **Managing county** in the **Administrative question package**. This will allow that jurisdiction to edit the event. Please note that only the most recent managing county will have edit permissions (i.e. managing county permissions are not cumulative). The accountable county will always have edit permissions:

Case Management		
Managing county notification date ⊟	05/14/2018 🔲	Add New
Managing county	Adams County ▼	
LHJ case ID		
User	Hepatitis WDRS	
Notes		

Managing county notification date (♦)
Input the date it became known the case had moved to a new jurisdiction.

Managing county

Input the county where the patient now lives.

LHJ case ID

If the new LHJ has a unique ID for this case, they can use this field to record it.

User

Automatically populated when "**Managing county notification date**" is input.

Notes

A place for the user to record any notes about the jurisdiction change.

Workflows
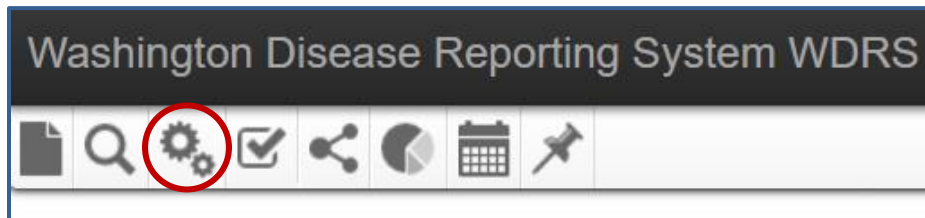
About Workflows

Washington Disease Reporting System (WDRS) includes workflows that organize events and the work that needs to be done on them. Workflows allow the user to keep track of Hepatitis events that may need to be investigated, reviewed, or completed. **They capture records created from 1) manual entry and 2) labs reported electronically that are automatically imported into WDRS.**

Most workflow queries update every 10 minutes. The frequency is based on the criticality of the workflow, as well as the burden on the system. Please allow 10 minutes before looking for changes that should cause an event to enter or exit a workflow.

An event may be in zero, one, or many workflows. To view a complete list of all the workflows an event is in, select **[View List]** next to **Notices** under the event's **Basic Information** panel.

Hepatitis Workflow Categories

Each workflow display shows the workflow queues, the total count of events in the workflow, the priority, and when the workflow was last updated. GCD and Hepatitis are in separate workflows. The categories of workflows for hepatitis are 'Open events', 'Lab reports for review – action required', and 'Potential chronic hepatitis cases – action required'.

Below are all workflows available to Hepatitis investigators:

HEP.003 - Open events [LHJ]

☆	HEP - Open Acute Hepatitis B events [LHJ]	5	Very High	05/10/2018 03:33 PM	
☆	HEP - Open Acute Hepatitis C events [LHJ]	7	Very High	05/10/2018 03:33 PM	
☆	HEP - Open Perinatal Hepatitis B events [LHJ]	1	Very High	05/10/2018 03:33 PM	
☆	HEP - Chronic Hepatitis B cases for person born 1992 or later [LHJ]	1	High	05/10/2018 03:33 PM	
☆	HEP - Chronic Hepatitis C cases for person born 1992 or later [LHJ]	0	High	05/10/2018 03:33 PM	
☆	HEP - Open Chronic Hepatitis B events [LHJ]	5	Medium	05/10/2018 03:33 PM	
☆	HEP - Open Chronic Hepatitis C events [LHJ]	8	Medium	05/10/2018 03:33 PM	
☆	HEP - Open Perinatal Hepatitis C events [LHJ]	0	Medium	05/10/2018 03:33 PM	

HEP.004 - Lab reports for review - action required [LHJ]

☆	HEP - Potential Acute HBV cases [LHJ]	1	Very High	05/10/2018 03:33 PM	
☆	HEP - Potential Acute HCV cases [LHJ]	0	Very High	05/10/2018 03:33 PM	
☆	HEP - Potential Perinatal HBV cases [LHJ]	0	Very High	05/10/2018 03:33 PM	
☆	HEP - Acute HBV cases that have become chronic infections [LHJ]	0	High	05/10/2018 03:33 PM	
☆	HEP - Acute HCV cases that have become chronic infections [LHJ]	0	High	05/10/2018 03:33 PM	

HEP.005 - Potential chronic hepatitis cases - action required [LHJ]

☆	HEP - Hepatitis B cases with unconfirmed subtype [LHJ]	12	Medium	05/10/2018 03:33 PM	
☆	HEP - Hepatitis C cases with unconfirmed subtype [LHJ]	11	Medium	05/10/2018 03:33 PM	

ELR-Created Events

New events that are created as a result of an Electronic Laboratory Report (ELR) can be accessed in the workflow categories: **Lab reports for review – action required** and **Potential chronic hepatitis cases – action required**. Events in these workflows will require review to determine whether they are acute, chronic or perinatal.

Hepatitis Workflow Columns

The display for each Hepatitis (HEP) workflow has a list of events that meet the criteria for the workflow. The columns of the display provide the identifying information for each event:

- Event – the case ID is an active link that will take you directly to the **Event Summary** screen.
- Full Name – last name and first name for case.
- Status – whether the event is open or closed.
- Create Date – the date the event was created in WDRS.
- Disease – condition associated with the event.
- Last Update – last date any update was made.
- Assigned To – person(s) to whom tasks for the event are assigned. (This is different from "Investigator". This column displays the people to whom **Tasks** are assigned for the event.)
- Assigned To Group – group to whom the event is assigned.

Workflow Details - HEP - Open Acute Hepatitis B events [LHJ]

HEP - Open Acute Hepatitis B events [LHJ] (Last Update: 05/16/2018 01:46 PM)

	Event	Full Name	Status	Create Date	Disease	Last Update	Assigned To	Assigned To Group
☐	100000021	One, Person	Open	05/16/2018	Hepatitis B and D	05/16/2018		
☐	100000002	Patient, Pretend	Open	05/14/2018	Hepatitis B and D	05/16/2018	Izumi Chihara	

You can sort events in your workflow by clicking on any column header. You can filter events that appear in the workflow by selecting a **'Filter:'** dropdown option, selecting the field for the filter, entering a condition, and clicking **'Apply'**. For example, you could filter for the disease as Hepatitis (includes all types) and then add an additional condition for last name. Click **'Clear'** to remove the filter.

Workflow Details - GCD open events [**Sort**] immediately notifiable [LHJ]

GCD open events that are immediately notifiable [LHJ] (Last Update: 05/15/2018 09:04 AM)

	Event	Disease	Last Name	First Name ▲	Birth Date	Investigator	Accountable county	Create Date
☐	000005 Virtual estion Packages • Cholera	Cholera	Test	Cholera		Jennifer Hubber	Pierce County	05/15/2018

Filter: [ ] [Contains ▼] [ ] Apply Clear Displaying 1...1 of 1 (Export All)
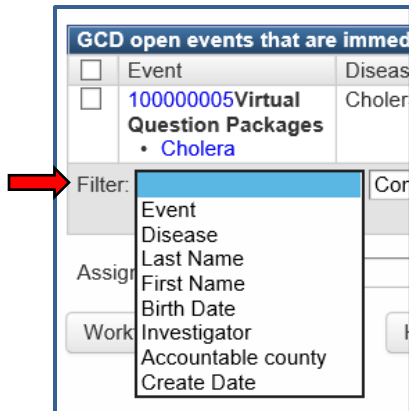
Assigning Events in a Workflow

You may assign a specific user or group to one or more events in a workflow. To assign an event, check the box(es) to the left of the **'Event'** column and select a user or group using the party picker magnifying glass icons. Click the **'Assign'** button. The main workflow page will now indicate which workflows contain events assigned to the user or group you have selected.
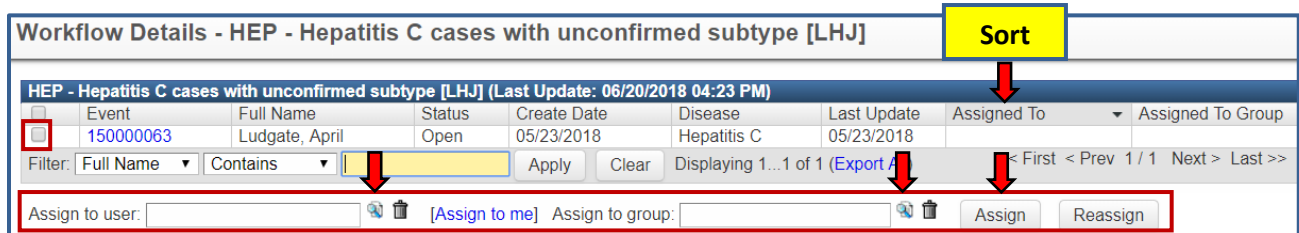
This functionality will effectively assign the user or group a **Task**, as shown on the **WDRS Home Page**. View the Tasks section of this document or the WDRS Quick Reference Guide for more information.

Navigate to the Workflows page to keep track of events assigned to you. The workflow is named "Open Cases – Assigned to Current User" under the **Case Specific Monitors** category:

Summary of Hepatitis Workflows and Expected User Actions

There are 3 different categories of Hepatitis workflows for the local health jurisdiction user:

1. Open events.
2. Lab reports for review.
3. Potential chronic hepatitis cases.

Tables 1, 2, and 3 describe workflows found in each category, expected user actions, and workflow priority level.

Table 1. HEP.003 Open events [LHJ]

Workflow	Description	Expected User Action	Priority
HEP - Open Acute Hepatitis B events [LHJ]	Acute events that need to be investigated. Enters when Acute HBV events are created.	Exits when "LHJ record complete date" is entered.	Very High
HEP - Open Acute Hepatitis C events [LHJ]	Acute events that need to be investigated. Enters when Acute HCV events are created.	Exits when "LHJ record complete date" is entered.	Very High
HEP - Open Perinatal Hepatitis B events [LHJ]	Perinatal HBV events that need to be investigated/completed. Enters when Perinatal HCV events are created.	Exits when "LHJ record complete date" is entered.	Very High
HEP - Chronic Hepatitis B cases for person born 1992 or later [LHJ]	Chronic HBV cases that may warrant investigation, due to potentially having a higher risk of transmitting disease. Enters when Chronic HBV cases with a date of birth of 1/1/92 or later are created.	Exits when "LHJ record complete date" is entered.	High
HEP - Chronic Hepatitis C cases for person born 1992 or later [LHJ]	Chronic HCV cases that may warrant investigation, due to potentially having a higher risk of transmitting disease. Enters when Chronic HCV cases with a date of birth of 1/1/92 or later are created.	Exits when "LHJ record complete date" is entered.	High
HEP - Open Chronic Hepatitis B events [LHJ]	Enters when Chronic B events are created.	Exits when "LHJ record complete date" is entered.	Medium

HEP - Open Chronic Hepatitis C events [LHJ]	Enters when Chronic C events are created.	Exits when "LHJ record complete date" is entered.	Medium
HEP - Open Perinatal Hepatitis C events [LHJ]	Perinatal HCV events that need to be investigated. Enters when Perinatal HBV events are created.	Exits when "LHJ record complete date" is entered.	Medium

Table 2. HEP.004 Lab reports for review – action required [LHJ]

Workflow	Description	Expected User Action	Priority
HEP - Potential Acute HBV cases [LHJ]	Potential HBV cases that may be acute based on lab information.	Exits when subtype is confirmed.	Very High
HEP - Potential Acute HCV cases [LHJ]	Potential HCV cases that may be acute based on high ALT values. Enters when a case with unconfirmed subtype has an ALT of greater than or equal to 200.	Exits when subtype is confirmed.	Very High
HEP - Potential Perinatal HBV cases [LHJ]	Potential HBV cases that may be perinatal based on lab information, and age is less than or equal to 24 months.	Exits when subtype is confirmed.	Very High
HEP - Acute HBV cases that have become chronic infections [LHJ]	Acute HBV cases that may have become chronic infections based on new lab information.	Exits when subtype is confirmed as "Chronic."	High
HEP - Acute HCV cases that have become chronic infections [LHJ]	Acute HCV cases that may have become chronic infections based on new lab information.	Exits when subtype is confirmed as "Chronic."	High

Table 3. HEP.005 Potential chronic hepatitis cases – action required [LHJ]

Workflow	Description	Expected User Action	Priority
HEP - Hepatitis B cases with unconfirmed subtype [LHJ]	Use this workflow to review Hepatitis B cases that may be chronic.	Exits when subtype is confirmed.	Medium
HEP - Hepatitis C cases with unconfirmed subtype [LHJ]	Use this workflow to review Hepatitis C cases that may be chronic.	Exits when subtype is confirmed.	Medium

Additional notes for workflows in: HEP.005 – Potential chronic hepatitis cases – action required [LHJ]

There is a function—"Mark as chronic"—that allows users to batch confirm cases as chronic in **1) HEP - Hepatitis B cases with unconfirmed subtype [LHJ]** and **2) HEP - Hepatitis C cases with unconfirmed subtype [LHJ]**:

However, you must clear certain workflow queues (see below for further instructions) before using the "Mark as chronic" button. This is because cases that appear in the potentially acute or perinatal workflows are **also** present in the potentially chronic workflows for each condition (Hepatitis B and C). It may take several minutes for the workflows to refresh and update.

WARNING: You MUST clear certain workflows (see below for further instructions) FIRST before batch marking cases as chronic in these workflows. If not, you run the risk of incorrectly classifying acute or perinatal cases as chronic.

If you are not comfortable using the "Mark as chronic" function, please review records individually and/or contact the Hepatitis team for assistance.

Hepatitis B

- You can mark groups of potential chronic hepatitis B cases as "Chronic" **AFTER** clearing the following workflow queues.
    1. HEP - Potential Acute HBV cases [LHJ].
    2. HEP - Potential Perinatal HBV cases [LHJ].
- Clearing a workflow queue means that the number of cases in the workflow should equal 0. It may take several minutes for the workflows to refresh and update:

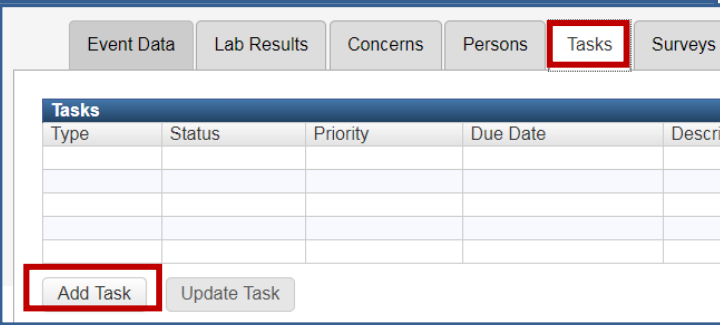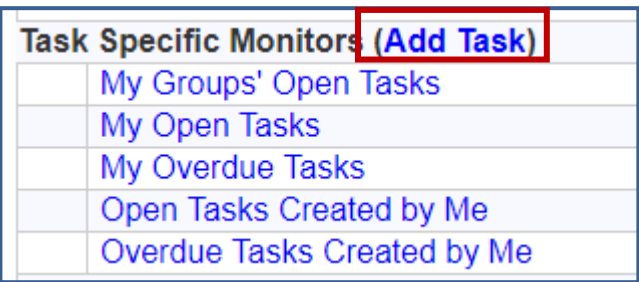| HEP.004 - Lab reports for review - action required [LHJ]				
☆ HEP - Potential Acute HBV cases [LHJ]	0	Very High	05/23/2018 12:57 PM	ℹ
☆ HEP - Potential Perinatal HBV cases [LHJ]	0	Very High	05/23/2018 12:57 PM	ℹ

Hepatitis C

- You can mark groups of potential chronic hepatitis C cases as "Chronic" **AFTER** clearing the following workflow queues:
    1. HEP - Potential Acute HCV cases [LHJ].
- Clearing a workflow queue means that the number of cases in the workflow should equal 0. It may take several minutes for the workflows to refresh and update:

HEP.004 - Lab reports for review - action required [LHJ]				
☆ HEP - Potential Acute HCV cases [LHJ]	0	Very High	05/23/2018 12:57 PM	ℹ

Tasks

Tasks are activities that need to be completed for an event/case. Tasks are a way for you to delegate work and can be assigned to specific users or groups. They can have a due date and are updated manually as they are completed.

Tasks can be viewed and created in three places and the functionality can be different depending upon where you initiate the create task action:

Where task is created	How to create task	Visual of where to create task
From within an event using the **Tasks** tab on the **Event Summary** screen	If you select the 'Add Task' button on the Tasks tab, you may only create an event-specific task.	
From the **Workflow Queues** page under the **Task Specific Monitors** category	If you select the 'Add Task' link from the **Workflow** page (under Task Specific Monitors), you can only create a general (non-event-specific) task.	
From the **Tasks icon** on the **Dashboard** toolbar	If you click the Tasks icon ☑ on the **toolbar**, you can create both – the task can be associated with the currently active event (if one is active) or it can be non-event-specific	

An example of a task that would be associated with a specific event is to ask a user to follow up on laboratory results. An example of a non-event specific task would be to ask a user (or group) to review lab results for all of the hepatitis events that have been received in their jurisdiction recently to check for similarities.

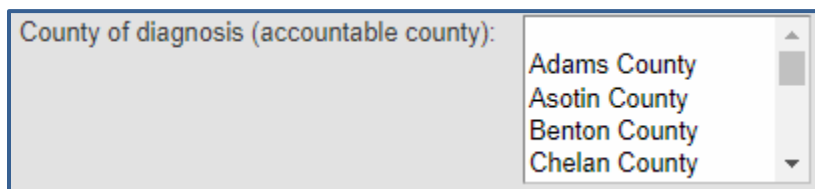For more details on creating, editing, and completing tasks, see the WDRS Quick Reference Guide.

Reports

Various reports are available to Hepatitis investigators (see table below). Refer to the [WDRS Quick Reference Guide](#) for a general overview on how to run a report. A data dictionary for all Hepatitis B & C reports can be found on the [DOH WDRS Hepatitis resource page](#).

Available Reports for Hepatitis B & C:

Report name	Description
Hepatitis B & C	
HEP Lab Report by Investigation Creation Date	Lab export filtered by date the lab was entered into WDRS
Hepatitis B	
Hepatitis B - Acute Report - (CDC Event Date)	Line list of acute events filtered by CDC Event Date
Hepatitis B - Acute Report - (LHJ Notification Date)	Line list of acute events filtered by LHJ Notification Date
Hepatitis B - Acute Report - (Record Creation Date)	Line list of acute events filtered by record creation date
Hepatitis B - Chronic Report - (CDC Event Date)	Line list of chronic events filtered by CDC Event Date
Hepatitis B - Chronic Report - (LHJ Notification Date)	Line list of chronic events filtered by LHJ Notification Date
Hepatitis B - Chronic Report - (Record Creation Date)	Line list of chronic events filtered by record creation date
Hepatitis C	
Hepatitis C - Acute Report - (CDC Event Date)	Line list of acute events filtered by CDC Event Date
Hepatitis C - Acute Report - (LHJ Notification Date)	Line list of acute events filtered by LHJ Notification Date
Hepatitis C - Acute Report - (Record Creation Date)	Line list of acute events filtered by record creation date
Hepatitis C - Chronic Report - (CDC Event Date)	Line list of chronic events filtered by CDC Event Date
Hepatitis C - Chronic Report - (LHJ Notification Date)	Line list of chronic events filtered by LHJ notification date
Hepatitis C - Chronic Report - (Record Creation Date)	Line list of chronic events filtered by record creation date

County of diagnosis (accountable county) is not a required field to run a Hepatitis report. If you do not select a county, the report will generate a line list of all events that you have permissions to view (including events you created that might have a different accountable county).

Glossary: Terms Commonly Used in WDRS

Dashboard: A central location from which the user can access the various areas and functionality of the system as well as see an overview of user specific workflows, tasks, assignments and recent events. Referred to in this manual as the "WDRS Home Page."

Concern: A message meant to notify the user of an issue regarding the event.

County of diagnosis (accountable county): This represents the county of residence at diagnosis, not the county where the testing was done.

Event: An "event" in WDRS represents the occurrence of a real-world event of interest to public health. These real-world events include but are not limited to:
- an occurrence of a reportable condition
- an investigation of suspected infection
- a contact/partner investigation
- the occurrence of an outbreak
- intervention activities
- maintenance of a disease registry

Most often, a WDRS event contains information about the association of a person with a disease or other health condition, for example, hepatitis, influenza, or blood lead poisoning. One person can be associated with one or more real-world events, with each real-world event being represented by a separate event in WDRS.

Some kinds of events are time-limited (for example, influenza); more than one event of the same kind can exist for the same person. Other kinds of events persist for the lifetime of the person (for example, HIV); only one event of this kind can exist for the same person.

Sometimes referred to in this guide as a "case" or "record".

Model: A collection of information related to one of five disease groupings in WDRS: General Communicable Disease (GCD), Hepatitis (except A and E, which are part of GCD), Blood Lead, Sexually Transmitted Diseases/HIV and Tuberculosis (TB).

Party: A party in WDRS is an entity that participates in one or more events. A party is most commonly a person, either the subject of an event (a "patient"), or a provider. A party can also be an organization, such as a health care facility or laboratory.

Question Packages: Sets of fields related to a specific topic for a disease or condition. Question packages allow users to enter information related to an event, including but not limited to: demographics, clinical information, epidemiological information and public health actions/interventions. Different users can access different question packages as determined by the model, the disease, and the user's security settings.

Wild Card: An asterisk (*) or a question mark (?) that can be used during searches (see the WDRS Reference Guide for more details).

Workflow: A list of events that meet specific criteria. An example of a workflow is a worklist of events that need follow-up action in order to be complete. When an event in a workflow is edited and that event no longer meets the criteria of interest, the event is removed from the workflow.